R9375-1

TRAVEL PRINTOUT
U.S. Travel Data Center
Research News for the U.S. Travel Industry

AUGUST 1992 Volume 21, Number 7

TRAVEL VOLUME RISES IN UNITED STATES FOR SIXTH CONSECUTIVE YEAR IN 1991

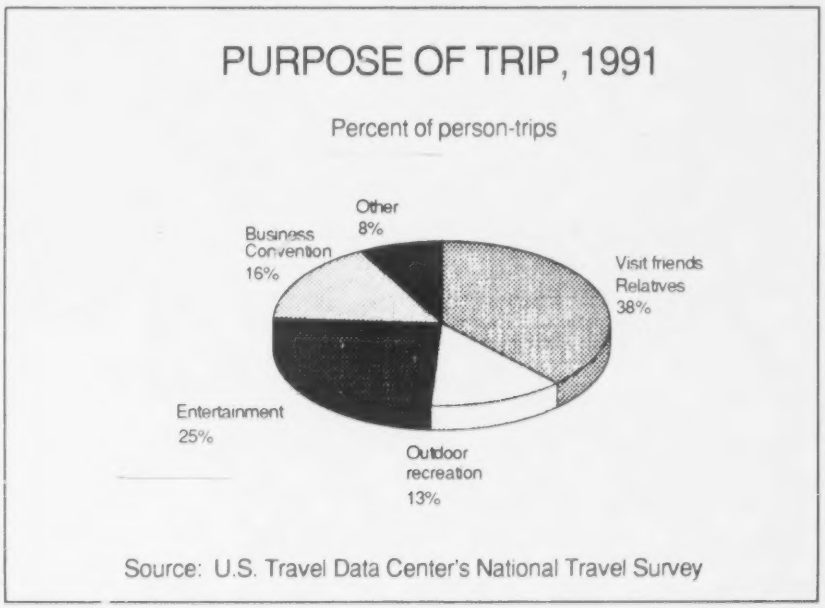
For the sixth consecutive year the volume of travel in the United States increased, according to the U.S. Travel Data Center's 1991 National Travel Survey. Last year, Americans took more than 1.3 billion person-trips*, an increase of 2.5 percent over 1990. The increase was primarily led by weekend trips, which grew 13.6 percent. Shorter trip durations, however, resulted in nearly a 2.5 percent decline in total person-nights for the year.

In 1991, 16 percent of 1.3 billion person-trips were classified as business or convention travel, 69 percent were considered vacation and 59 percent took place over a weekend or long weekend. Visiting friends and relatives remained the number one reason Americans traveled in 1991. It was closely followed by Americans who traveled for entertainment purposes (25%).

As in previous years, many 1991 travelers used auto/truck/RV transportation (80%), stayed in commercial lodging (43%) and ventured more than 800 miles on the average trip. They traveled primarily for pleasure: visiting friends and relatives, outdoor recreation or entertainment purposes (76%).

In addition, the Data Center's National Travel Survey also revealed the continuation of other trends. Travelers in 1991 took shorter trips, staying fewer nights away from home. In 1989, the average round trip distance was 910 miles. That number dropped in 1990 to 839 miles and last year the number dropped further to just over 800 miles. Over the last few years, the duration of trips has also declined slightly, from 4.1 nights in 1990 to 3.9 nights last year.

The popularity of shorter trips has become evident in the last few years, taking a big jump between 1989 and 1990. More than 767 million weekend person-trips were taken last year, up 13.6 percent from 1990.



Source: U.S. Travel Data Center's National Travel Survey

"Shorter trips continue to be the dynamic growth area in travel," said Suzanne Cook, executive director of the Data Center. "Many people don't have the time or the financial means to take longer excursions. Although they are taking shorter trips, the average traveler is taking more trips as reflected in the overall rise in travel last year."

Once again, the South Atlantic region of the United States was the most popular destination for travelers (22%). The East North Central region was the second most popular, garnering 12 percent of all U.S. travelers.

Travelers in 1991 favored auto/truck/RV modes of transporta-

(Continued on page 3.)

INSIDE

- June Travel Price Index Report
- 1991 Travel Ads Drop
- Travel Outlook Forum

Prices Rise For First Time In Two Months

For the first time in two months the cost of travel rose in the United States. According to the U.S. Travel Data Center's Travel Price Index (TPI), the 0.7 percent rise in travel costs can be attributed to a rise in lodging rates and the cost of motor fuel.

Despite the rise in the overall cost of travel, airfares in the month of June plummeted 6.5 percent, reflecting the airfares war that began in early June. Overall, the TPI rose 3.1 percent compared to the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 149.09 (1982-84=100) during June. The TPI indicates price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs the travelers actually paid.

The Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contact, Joseph P. Horak.

TRAVEL PRICE INDEX AND COMPONENTS

JUNE 1992	MONTHLY % CHANGE MAY 1992 TO JUNE 1992	ANNUAL % CHANGE JUNE 1992 TO JUNE 1991
TPI COMPONENTS		
TRANSPORTATION	-1.7	-1.0
Airline Fares	-6.5	-4.3
Intracity Public Trans.	0.1	6.2
Other Intracity Trans.	0.2	4.8
Motor Fuel	3.5	2.4
LODGING	3.2	7.4
FOOD AND BEVERAGES AWAY FROM HOME	0.2	2.0
ENTERTAINMENT	-0.4	2.0
TRAVEL PRICE INDEX	**0.7**	**3.1**
CONS. PRICE INDEX	**0.4**	**3.1**

(SOURCE: U.S. TRAVEL DATA CENTER)

Discoveries...

Travel Advertising Drops 5 Percent In 1991

Travel industry advertising declined by 5 percent in 1991 according to Ogilvy and Mather's 1992 annual **Trends in Travel and Tourism Advertising Spending** study. Although the drop varied widely by market segments, the study reported that the total industry spending declined by $62 million.

The greatest drop in advertising spending was seen among U.S. flag airlines. The study found that this segment showed a drop of $72 million, down 12 percent from 1990. In comparison, foreign countries exhibited a 24 percent increase in their 1991 advertising expenditures within the United States. The study reported that this escalation was an attempt to restore their lost traffic, which declined 16 percent in the key U.S.-to-Europe market in 1990.

The Ogilvy and Mather study analyzes in detail the past five years of consumer advertising spending by U.S. and foreign airlines, cruise lines, domestic destinations (including U.S. states and other domestic destinations); and foreign destinations (including Mexican resorts, Canadian provinces and other foreign destinations). Total category spending and expenditures by each category's leaders and their allocation by media are compared to the last five years.

The 1992 edition of **Trends in Travel and Tourism Advertising Spending** is available for $100 and can be obtained by sending a check to Ed Berrol at Ogilvy and Mather, 309 West 49th Street, New York, New York, 9th Floor, (212) 237-4662.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

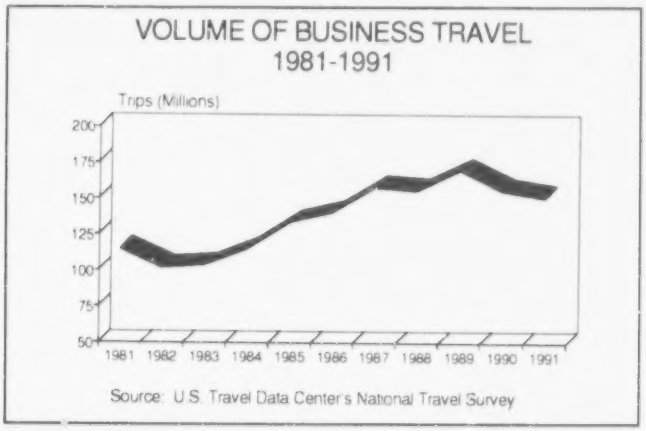
Joseph P. Horak, Editor

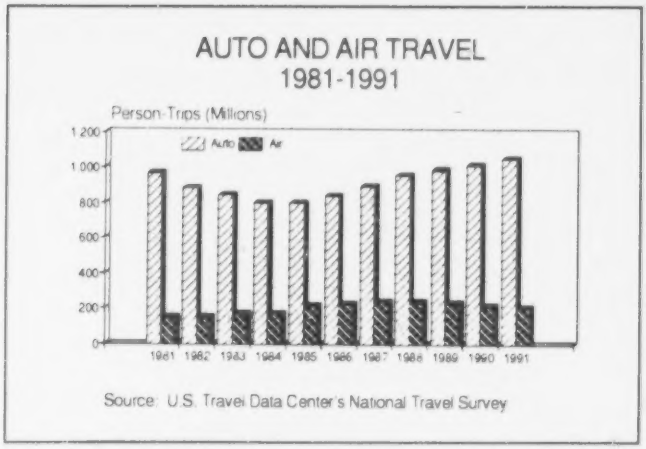
TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; Foreign countries, $80. ISSN: 0744-6233

Continued from page 1 tion, registering 1.05 billion person-trips, which was nearly a 4 percent increase over 1990. Additionally in 1991, the number of persons-per-trip increased for the third straight year, rising from 2.09 person- per-trip in 1990 to 2.12 in 1991.

Air travel declined in the United States in 1991. Americans took just over 205 million person-trips by air in 1991, nearly a 4 percent decline from 1990.

Business travel experienced a decline of 3 percent during 1991, as 150.6 million trips were taken. Americans traveling for business purposes averaged much shorter round-trip distances in 1991 than in 1990 (862 miles vs. 1,020 miles). The average duration of a business trip was 3.8 nights in 1991, compared to 3.7 nights during the previous year. Automobiles were the primary mode of transportation for 1991 business trips (55%), down from 58 percent a year ago.





The National Travel Survey is a telephone survey conducted with a national probability sample of 1,500 U.S. adults per month and has been in continuous operation since 1979. Proprietary questions may be added and custom tabulations requested. For more information, or to order a copy of the 1991 National Travel Survey Market Report ($165), contact the marketing department at (202) 293-1040. (Data Center members will be sent a complimentary copy.)

(*A person-trip is one traveler taking one trip 100 miles or more, one-way, away from home.)

October 28.....

Travel Outlook Forum Scheduled For Oct. 28

The 18th Annual Travel Outlook Forum will be held October 28 at the Sheraton Washington Hotel in Washington, D.C. The theme for the 1992 forum is "Motivating The Consumer: Challenges And Opportunities For The '90's".

This year's event, sponsored by the Data Center and the Travel and Tourism Research Association (TTRA), will be held in conjuction with the Travel Industry Association's 1992 Travel Industry National Conference.

The day-long forum will feature marketing experts, academicians and analysts from every segment of the travel and tourism industry. These experts will forecast the travel and tourism trends in 1993, as well as weigh the events of the past.

Several prominent industry experts have already confirmed plans to speak at the forum, including Steve Malin, manager, public information at the Federal Reserve; Harvey Shields, director, office of research, U.S. Travel and Tourism Administration (USTTA); John Riener, president, Carlson Travel Network-Commercial; and many more.

For registration information and a program outlining the 1992 Forum, contact the Data Center at (202) 293-1040 or by fax at (202) 293-3155.

Other Speakers include:

- Thomas Crosby, AAA
- David Swierenga, Air Transport Association
- Randy Smith, Smith Travel Research
- Beverly Shipka, American Airlines
- Barbara Wickliffe, Best Western International
- Peter Mason, Better Homes and Gardens
- David Stroud, Kissimmee/St. Cloud CVB
- Watts Wacker, Yankelovich Clancey Shulman
- Suzanne Cook, Executive Director, Data Center
- Jerry Foster, Chairman, Data Center
- Joan McClellan, President, TTRA
- Hank Brandt, Official Airlines Guide

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	MAY	$5,773	millions	-0.2	3.1	4.4
Eating and Drinking Places (2)	JUNE	$16,287	millions	-0.6	-0.1	3.8
Gasoline Service Stations (2)	JUNE	$10,561	millions	1.6	-0.8	-3.8
Consumer Lodging Demand					
Hotels/Motels Occupancy Rates (3)	MAY	62.3	percent	1.5	0.2	2.9
Real Demand For Commercial Lodging (4)	MAY	68.4	millions	1.7	4.2	5.1
Airline Passenger Traffic (5)					
Domestic Revenue Passenger Miles	JUNE	32.0	billions	17.1	9.1	0.8
Int'l Revenue Passenger Miles	JUNE	11.8	billions	12.6	6.8	23.3
Highway Traffic Volume (6)					
Rural Arterial Vehicle Miles	MAY	49,179	millions	6.9	3.8	5.0
Rail Passenger Traffic (7)					
Amtrak Passenger Miles	MAY	521.4	millions	-4.8	-3.8	0.1
Travel Price Index (8)					
(1982-1984 = 100)	JUNE	149.1		0.7	3.1	2.4
Visitor Vol. at National Park Service Areas (9)					
Recreational Visits	MAY	26.2	millions	22.5	4.2	6.6
Overnight Stays	MAY	1.6	millions	60.0	3.0	5.0
Foreign Arrivals to the United States					
From Overseas (10)	MAR	1,275,424		5.7	13.8	26.5
	FEB	1,206,826		-0.4	51.8	34.3
	JAN	1,211,763		-16.4	20.5	20.5
From Canada (11)	MAY	1,470,499		-6.1	0.6	4.9
From Mexico (10)	MAR	94,390		8.9	-24.6	3.6
	FEB	86,643		-6.2	32.3	29.2
	JAN	92,327		41.7	26.4	26.4
U.S. Citizen Departures					
To Canada (11)	MAY	1,064,327		63.4	0.5	2.4
Domestic Demand For Motor Gasoline (12)					
Barrels Per Day	MAY	7,315	thousands	0.8	-1.6	1.5

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) National Parks Service, preliminary, unadjusted for differences in reporting units. (10) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (11) Statistics Canada. (12) U.S. Department of Energy, prelim.

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

U.S. Travel Data Center
Two Lafayette Centre
1133 21st Street, NW
Washington, DC 20036-3390
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

Ms. Jeanne Lony
Congressional Information Service
4520 East-West Highway
Suite 800
Bethesda, MD 20814

AUGUST 1992